

PUTTING THE PIECES OF THE FINANCIAL PUZZLE TOGETHER IN 2017

COLLECTIVE CLIENT ACHIEVEMENTS

ASSETS

Assets purchased included 13 homes, a car, and a business.

15
ASSETS
PURCHASED

DEBT

Several clients significantly paid down their debt in 2017; some by more than \$8,000!

\$96,899
DEBT
REDUCED

SAVINGS

One client saved \$20 cash every payday in her savings diary. She is now up to nearly \$1,500!

\$10,743
SAVED

CONFIDENCE

Financial confidence is measured via pre- and post-tests and in coaching sessions.

460 CLIENTS
GREW
THEIR
CONFIDENCE

HEALTHY PRODUCTS

Healthy financial products include mainstream checking accounts, credit builder loans, retirement plans, etc.

11
PRODUCTS
OPENED

33
REFERRALS
MADE

REFERRALS

Staff refer clients to local partners for critical wraparound services.

19PT
AVERAGE
CREDIT
INCREASE

CREDIT SCORE

In total, 17 clients improved their credit scores, ranging from 3 to 144 points.

1,590
CLASS
ATTENDEES

CLASSES

331 classes were held at our Excel Centers and in the community.

1,072
COACHING
SESSIONS

COACHING

Many clients attend multiple coaching sessions. The total number of unique clients in 2017 was 467.

62
GOALS
ACHIEVED

GOALS

Clients self-identify their goals. Examples include decreasing debt and purchasing a home.